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CRM OnDemand

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Forecast Definition

Create Forecast Snapshot Each Week Active

Forecast Definition Update

Next Forecast Series Dates

Forecast Date

11/23/2003

Forecast Series Participants

Last Name

Phillips

Rogers

Taylor

Weller

Williams

First Name

Ethan

Rick

Ryan

Lisa

Joan

Number of records displayed

25

Internet

Forecast Snapshot Day Sunday } -102

~103

~104

Fig 1

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Forecast Definition

Forecast

Step 1

Step 2

Step 3

Next

Cancel

Select your Forecast Snapshot Frequency

Create Forecast Snapshot Each\*

Week

\* = Required Field

Advanced Search

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### Forecast Definition

Step 1

Step 2

Step 3

Previous Next Cancel

Previous Next Cancel

Select your Forecast Snapshot Auto Forecast Date

Forecast Snapshot Day Sunday

\* = Required Field

302

Fig. 3

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Internet

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Press https://od1.sabel.com/OnDemand/User/ForecastAdd

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opportunity

account

lead

service request

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Forecast Definition

Step 1

Step 2

Step 3

Select the Roles you wish to include in your Forecast. The Users related to each role will be the Forecast Participants

Company Roles

Field Sales Rep  
Service Manager  
Service Rep

Forecasting Roles

Executive  
Sales & Marketing Manager  
Inside Sales Rep  
Administrator

402 403 404

Fig 4

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Forecast Homepage

Forecast Homepage									
Status	Forecast Date	Pipeline	Forecast	Closed Revenue	Owner				
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Ethan Phillips				
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Joan Williams				
Active	9/21/2003	\$35,450,000.00	\$27,550,000.00	\$1,400,000.00	Ryan Taylor				
Active	9/21/2003	\$10,400,000.00	\$7,200,000.00	\$3,200,000.00	Rick Rogers				
Active	9/21/2003	\$0.00	\$0.00	\$0.00	Lisa Walker				
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips				
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams				
Active	10/19/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor				
Active	10/19/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers				
Active	10/19/2003	\$0.00	\$0.00	\$0.00	Lisa Walker				
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips				
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams				
Active	10/19/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor				
Active	10/19/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers				
Active	10/19/2003	\$0.00	\$0.00	\$0.00	Lisa Walker				
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips				
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams				
Active	10/26/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor				
Active	10/26/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers				
Active	10/26/2003	\$0.00	\$0.00	\$0.00	Lisa Walker				
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Ethan Phillips				
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Joan Williams				
Active	11/2/2003	\$3,000,000.00	\$3,000,000.00	\$0.00	Ryan Taylor				
Active	11/2/2003	\$5,600,000.00	\$4,550,000.00	\$0.00	Rick Rogers				
Active	11/2/2003	\$0.00	\$0.00	\$0.00	Lisa Walker				

Number of records displayed: 25

Fig. 5

Handwritten annotations: }-502, }-503, and a large bracket spanning the top of the table.

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Forecast Summary | Save | Cancel | Refresh | Clear

Forecast Date	Closed Revenue	Forecast	Best Case	Pipeline	Expected Revenue
9/1/2003	\$3,450,000.00	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
9/1/2003	\$2,350,000.00	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003	\$2,000,000.00	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$7,800,000.00	\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

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Fig 7